KanCare Customer File Upload Utility

KDADS and KanCare Organizations Instructions

December 31, 2012

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General Instructions

Overview

The KanCare Customer File Upload Utility Application is a KDADS web application.

System Requirements and Browser Settings

- **Firewall Settings** may need added.
    - To check if you will be able to access the KDADS Web Application site, follow the steps on pages 3-4. If the sign in page does not display, our site will need to be added to your firewall. Please contact the KDADS Help Desk for the specific address/port to be added to the firewall.
- Internet Connection
- Internet Browser:
    - Microsoft Internet Explorer 6.0 or newer - Recommended
    - Firefox – current version
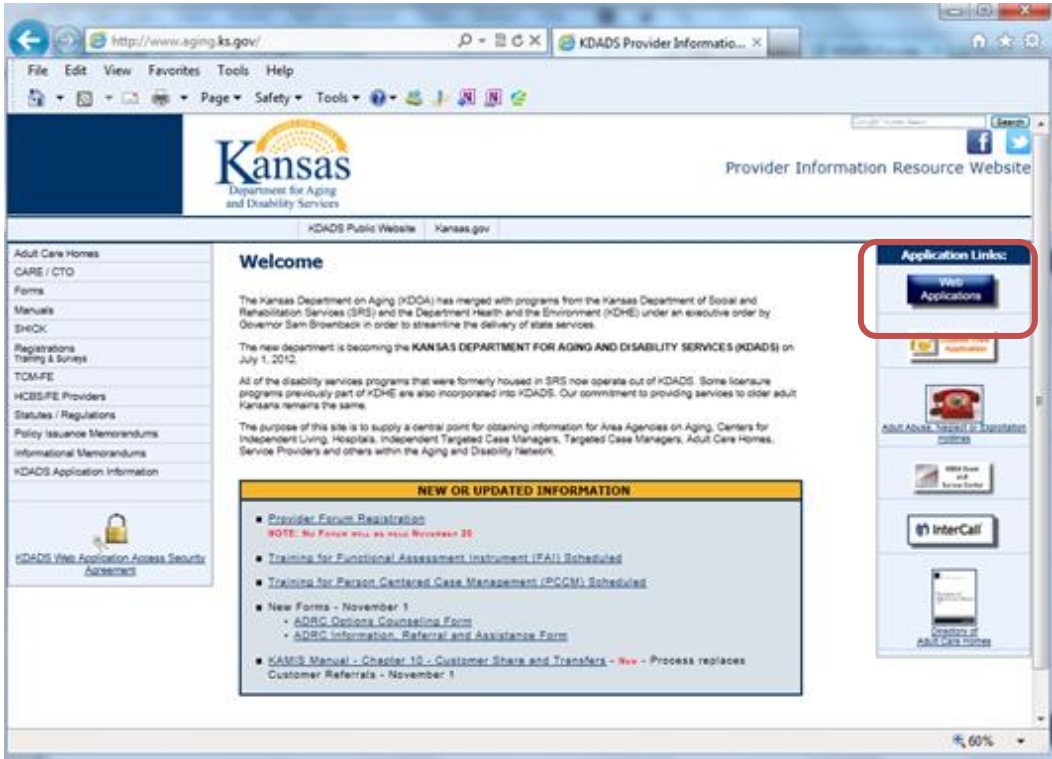- Disable all Pop-Up blockers

Contact Persons

Issue	Contact Person

Application How To Questions Password Change	KDADS Help Desk
	Phone:
	    (785) 296-4987
	     or
	    (800) 432-3535
	E-Mail:
	    HelpDesk@kdads.ks.gov

Accessing the Application

Introduction Use Microsoft Internet Explorer or FireFox browser to access the KDADS web application site. All KDADS Web Applications are secured and encrypted.
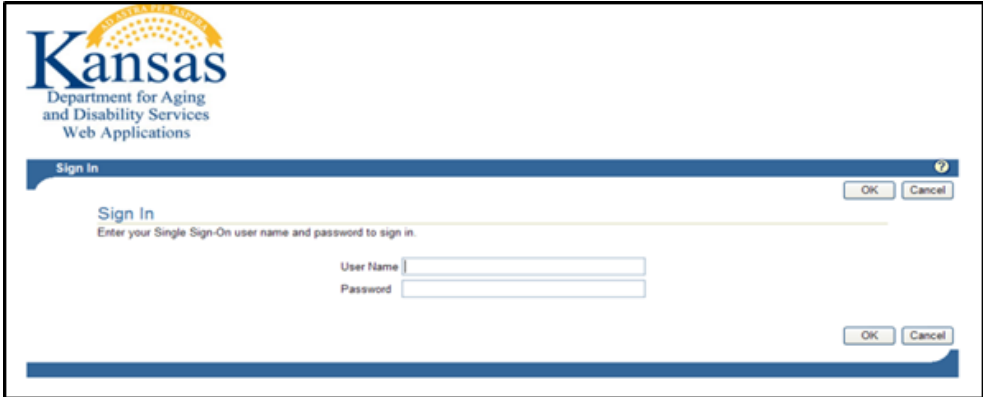
How To Follow the steps in the table below to accessing the login page for the KDADS Web Application.

Step	Action	Result
1.	Open the internet browser. Access the KDADS Provider Information Resource Web Site. www.aging.ks.gov	The KDADS Provider Web Site Home Page will be displayed.
2.	Select the **Web Applications** link under the "Applications Link".	The KDADS Web Application Login page will display.

Logging-In

How To   Follow the steps in the table below to complete the Login process.

Step	Action	Result
1.	Once the Login page is displayed. Type the **User Name**. Press **Tab**.	Insertion point advances.
2.	Enter **Password**. If it is the first time signing into the application, use the initial password that was issued in the e-mail from the KDADS Information Services Division. Click the **OK** button.	The Web Application Home page will display.

Accessing the KanCare Customer File Upload Utility Application

How To   Follow the steps in the table below to access the MCO View Customer Uploaded Files application.

Step	Action	Result
1.	To access the application, click on the **MCO View Customer Uploaded Files** button on the Web Applications Home Page.	
2.	Opens to the **KanCare Customer File Upload Utility Listing** page of the application.	

Customer Files Uploaded Listing

Introduction

The report displays the customers who have had files uploaded by their perspective Case Management Entity. KDADS Information Services Division (ISD) has run several matching scripts to assign the file records to their assigned/selected MCO. KDADS ISD continues this process as new files are received from the MMIS system. The listing is an Interactive Report, which gives the user a table view then allows the user to utilize filters and sorts to locate certain customers as needed.

The report is interactive with a search field. Enter the criteria (person's name, Medicaid ID number, etc.) and click on the "Go" Button.

Also available, are filter status options:

1. All – All files that have been created are available.
2. Not Reviewed – The listing will filter to the files that have NOT been marked for deletion.
3. Reviewed and Downloaded – The listing will filter to view the files that have been marked for deletion.

There is also a count for each MCO as to how many records have been posted and assigned to their individual MCO and how many of those records have been downloaded and marked complete.

Additional sorting and filtering options as well as a download utility can be found under the "Gear" icon.
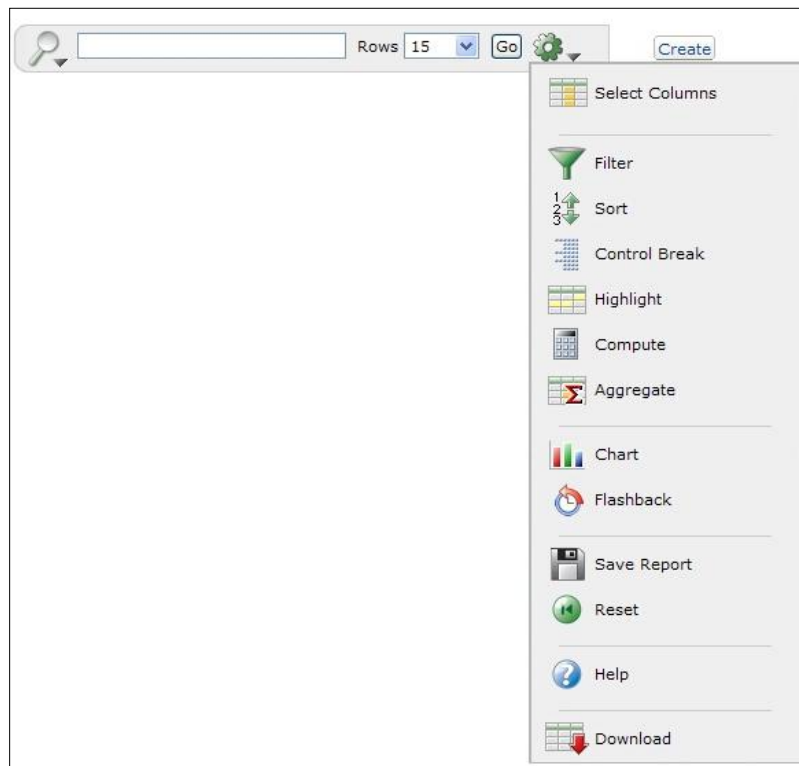
5

Interactive Report Functions

Features   Below are the more commonly used reporting tools features offered by interactive reports.

How to
1. Open the Web Application at the Interactive Report view.
2. Click on the gear icon.
3. Report Control List will display.

Functions Covered   This instruction guide will cover only the most commonly used report functions. Those functions are Filter and Sort.
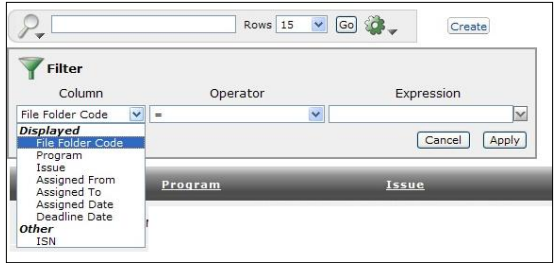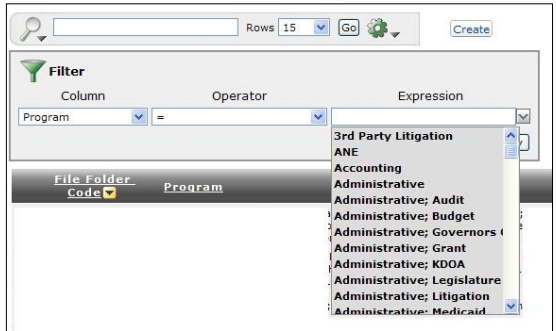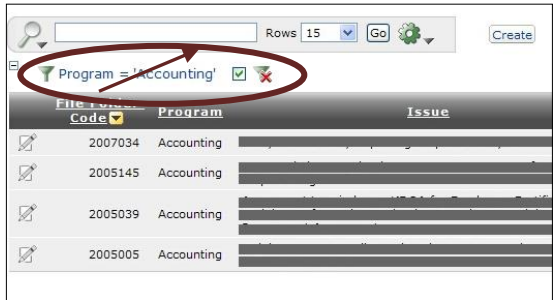
Interactive Report Function Descriptions

Functions   Below are the descriptions of all the functions available in an interactive report.

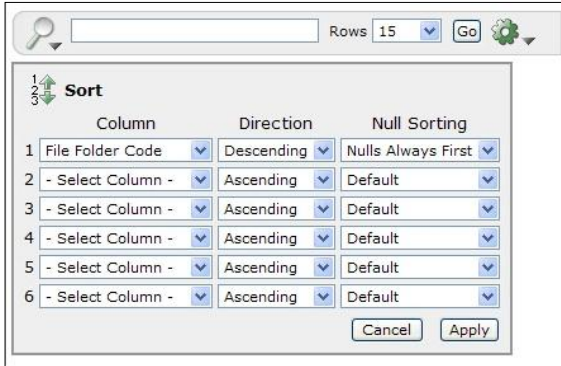| Reporting Control List	Action
Select Columns – Used to modify the columns displayed. The columns on the right are displayed. The columns on the left are hidden. You can reorder the displayed columns using the arrows on the far right. Computed columns are prefixed with **.	
	Filter – Used to filter data for a more detailed view of information.
	Sort – Used to change the column(s) to sort on and whether to sort ascending or descending. You can also specify how to handle nulls (use the default setting, always display them last or always display them first). The resulting sorting is displayed to the right of column headings in the report.
	Control Break – Used to create a break group on one or several columns. This pulls the columns out of the Interactive Report and displays them as a master record.
	Highlight – Highlighting allows you to define a filter. The rows that meet the filter are highlighted using the characteristics associated with the filter.
	Compute – Computations allow you to add computed columns to your report. These can be mathematical.
	Aggregate – Aggregates are mathematical computations performed against a column. Aggregates are displayed after each control break and at the end of the report within the column they are defined. Only numeric columns will be displayed.
	Chart – You can include one chart per Interactive Report. Depending upon the data in the report, the chart function may not be useful.
	Flashback – Not available.
	Save Report – Saves the customized report for future use. You provide a name and an optional description. A tab will be displayed for each report saved.
	Reset – Restores report to the default settings.
	Help – On-line Help on report functions.
	Download – Allows the current report to be downloaded. The download formats is CSV which can be opened through Excel.

The second column of the table contains the following icons: Select Columns, Filter, Sort, Control Break, Highlight, Compute, Aggregate, Chart, Flashback, Save Report, Reset, Help, Download.

Interactive Report – Filter

How To   Follow the steps in the table below to filter a Report.

Step	Action
1.	Select **Filter** from the Control list.
2.	Select the **Column** to filter Select the **Operator**
3.	Select the **Expression**. ● By clicking on the drop down arrow at the end of the express field, options will appear if appropriate.
4.	Click on the "**Go**" button. Report will display. The filter criteria will display at the top of the report.

Interactive Report – Sorting
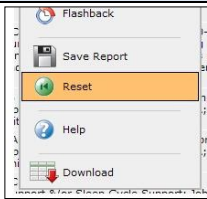
How To   Follow the steps in the table below to sort a Report.

Step	Action	
1.	Select **Sort** from the Control list.	
2.	Select the **Column**(s) to be sorted. Select the **Direction** (Ascending or Descending) Select how the **Blank Fields** (nulls) should be displayed.	
3.	Click on **Apply**. Report will display.	

Interactive Report – Reset Report
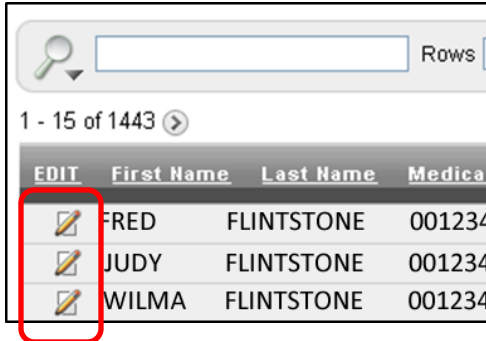
How To   Follow the steps in the table below to reset the Report back to default.

Step	Action	
1.	Select **Reset** from the Control list.	
2.	Click on **Apply**.	

Accessing the Customer File Upload Utility Detail

How To   Follow the steps in the table below to access the detail page.

Step	Action	Result
1.	Under the Edit Column, **click** on the **pencil/paper icon**.	The detail page will display.

Customer File Upload Utility Detail

Introduction KDADS required certain information when the Case Management Entity entered the customer recorded into the Utility.

Button	Action / Purpose
Return To List	Will return to the Report Listing.
Apply Changes	Save subsequent data entry. MCO's will mark the file as reviewed and downloaded.
Exit to Website	Will return to the KDADS Provider Information Resource website. (www.aging.ks.gov)

Files Uploaded By Information	
Field	**Action / Purpose**
First Name	
Last Name	
Organization Name	
E-Mail	
Contact Phone Number	

Customer Information	
Field	**Action / Purpose**
First Name	
Last Name	
Date of Birth	
Social Security Number	
Medicaid ID Number	
KAMIS Person Number	

Viewing an Attachment

Introduction   All attached files are associated with the customer detail page.

How to View the File   Follow the steps below to view an attached file on a specific report.

Step	Action	Results
1.	Locate the Attached / Upload Files region on the right hand side of the detail page.	
2.	Click on the **file name**	"CSW-NOA" in the above example. The document will open.

Marking a File as Reviewed/Downloaded and Ready for Deletion

Introduction   Due to the size of the attachments, once the MCO reviews and downloads the documents to their own file system, the file can be marked "ready for deletion" from the KDADS Utility system.

How to Delete a File   Follow the steps below to mark the record for deletion.

Step	Action	Results
1.	Locate the checkbox options above the Attached / Uploaded Files region on the right side of the detail page.	
	Reviewed and Downloaded and Can Be Removed: ☐ Attached / Uploaded Files	
2.	Select the **checkbox**.	Checkmark is displayed.
3.	Click on the **Apply Changes** button.	File is saved with the indication that the file is marked for deletion.
Note: On the Customer Files Uploaded Listing, there are filter status options available: 4. All – All files that have been created are available. 5. Not Reviewed – The listing will filter to the files that have NOT been marked for deletion. 6. Reviewed and Downloaded – The listing will filter to view the files that have been marked for deletion.		

Logging-Out

Introduction   When the user will not be using the application for a period of time, log off the program for security reasons.

How To   Follow the steps in the table below to exit the application.

Step	Action	Result
1.	In the upper right corner of the window, there are three navigational options.	

Link	Action
Logout	The browser will return to the Log-in page
KDADS Home Page	Returns back to the KDADS Home Page for further access options.